



Overview...

Powerful Solutions for Project Driven Organizations

Maximizing on time and profitable delivery of projects while maintaining high levels of customer satisfaction are the goals of every project driven organization. Project managers, resource managers, business managers, consultants, executives, team members, IT professionals and accounting staff must work together to achieve these goals using tools tailored to their specific roles and responsibilities.

Microsoft Business Solutions Professional Services Automation combines the power of the **Solomon Project Series** accounting solution and the new enterprise version of **Microsoft® Project 2002** providing project stakeholders with the tools they need to be successful. This end-to-end solution delivers powerful functionality for managing all phases of a project – from planning, scheduling and status review to expense capture, profitability analysis and billing.

The Best of Both Worlds: Integrated AND Best-of-Breed

Too often, project-driven organizations are asked to make choices in their business application selection. They can either buy best-of-breed line of business applications and integrate them at great cost or purchase a fully integrated solution that lacks functional depth in key areas. Successful management of your business and its projects requires integrated tools that are also functionally deep.

The new Professional Services Automation solution combines best-of-breed functionality with unparalleled flexibility allowing project driven organizations to exceed their objectives. The solution provides integrated resource management, project management, knowledge management, time and expense, project accounting, financials, reporting and analytics.

Solomon IV 5.0 Project Series



*This powerful integrated solution for the Microsoft Business Solutions Solomon IV 5.0 Project Series accounting application will be available in the second half of 2002. The functionality described in this document requires the use of Microsoft Project Professional 2002, Microsoft Project Web Access and Microsoft Project Server 2002. Visit www.microsoft.com/BusinessSolutions/PSA for more information.

"The number-one reason for implementing PSA is to increase management effectiveness."

-David Hofferberth,
Research Director, Aberdeen Group

"APCO is known for fully integrated global Public Affairs and Strategic Communication programs and we had to have a business solution to match. We needed an integrated financial and project accounting system that would allow us to capture costs more accurately and invoice our customers faster. And, we needed to capture all project time and materials costs in a consistent way around the world. As a result of implementing the project accounting and financials modules from Microsoft Business Solutions PSA, we improved our cash position for an impact to profit of almost 1% of revenue, and we have completely eliminated client write offs as a result of accounting errors for a 2% impact to the bottom line. The solution has already paid for itself, and we're excited about the gains in resource utilization we can expect during our roll out of the project and resource management capabilities."

-Chrystal Kern,
Worldwide CFO, APCO Worldwide



"Customers deploying PSA solutions emphasizing financial processes (time and expense, invoicing, etc.) indicate greater satisfaction and ROI benefits."

"The main goals in PSA deployment for Professional Services Organizations are increased resource utilization and better financial management."

-David Hofferberth,
Research Director, Aberdeen Group



Professional Services Automation

Microsoft Business Solutions™



Projects. Profits. Power.



Contact your certified Microsoft Business Solutions Partner

Microsoft Business Solutions Partners certified in project applications can analyze your needs and goals, optimize product selection, tailor and install your system, then train you and your staff in its efficient use.

Call 1-800-456-0025 today or visit www.microsoft.com/BusinessSolutions/PSA to learn more and see this solution's full capabilities.



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1. Plan...

Plan Intelligently

Project and financial managers can now efficiently plan projects and control budgets together to maximize profitability.

Guided Planning – Quickly master the project planning process with the new interactive Project Guide in Microsoft Project 2002 which helps you set up plans and track projects. Customize the Project Guide to effectively promote your organization's best practices from within Microsoft Project.

Granular Budget Control – With the ability to track and control your budgets from project initiation to completion, right from within Microsoft Project, you'll see how change orders and revisions affect your budget throughout the life of a project. Revenue and cost budgets can be defined for each cost category for each project task making it easy for project managers to spot and receive alerts when cost overruns and other potential problems threaten projects success.

Flexible Project Creation and Standardization – Create projects, tasks and budgets manually or reuse enterprise-wide templates to promote standardized reporting and planning across your organization. Initiate and update projects automatically in both Microsoft Project and Project Series so project managers and accounting staff can use the tools throughout the project that are most appropriate for their roles.

Centralized Resource Management – Manage resources effectively throughout your organization with a central resource pool. Use the Microsoft Project Resource Center to view, group, and edit enterprise resource information and evaluate availability across multiple projects. Update the enterprise resource pool automatically using cost rates from Project Series so that back office staff and the front line project managers are accessing common data.

Resource Optimization – Get accurate information about resources throughout your enterprise so that you can assemble the best team for each project. Evaluate skills and assignments with the help of resource availability graphs, the Resource Substitution Wizard and the Build Team From Enterprise option.

Demand Planning – Determine the skills and resources required to execute on proposed projects to ensure that the right people are available for the right jobs when you need them.



2. Execute...

Execute Effectively

Collaborative tools and shared data allow project teams and business stakeholders to keep projects on time and on budget.

One-time Data Entry – Reduce administrative delays and errors caused by duplicate data entry. Customers, contracts, projects, tasks, resources, budgets, time, expenses and financial transactions can be entered once and used everywhere they are needed throughout the solution. And, server level connections completely eliminate the need for manual import and export of files to and from Microsoft Project.

Time and Expense Reporting with Materials Capture – Eliminate errors and duplicate data entry by allowing project team members to capture time and expenses at the project and task level for multiple purposes - costing, billing, payroll and project status update purposes. And, unlike many systems, your project and accounting staff can capture materials costs and other accounts payable transactions directly against projects and tasks providing insight into the ALL the costs associated with your projects, not just the labor costs.



Enterprise Portfolio Visibility – Quickly evaluate mission-critical initiatives and identify projects that are behind schedule or over budget with high-level views of projects across your organization. Gain insight into projects with Portfolio Analyzer, a flexible analysis tool in Microsoft Project 2002 that allows you to interact with real-time project and resource data to identify trends and problem areas throughout your portfolio.

Resource Utilization – Maximize profits by efficiently, accurately and consistently tracking employee utilization data. Track everything from goals for billable hours and revenue to actual hours billed and revenue earned.

Project Financial Reporting – Whether you are a project manager, line manager or project accountant, get easy access to the data you need for analyzing project financial performance – even on multiple projects at one time. Get a clear and detailed view of project and task profitability. Evaluate budgets versus actuals with fine grain accuracy using drill down and graphing tools.

Team Collaboration – Easy-to-use Web-based access lets team members and project stakeholders view, update and submit project information, such as time cards, expense reports and task status updates. Review and approval capabilities streamline workflow and ensure timely and accurate submission of mission critical data. This allows you to bill your customers, analyze profitability and review project status faster than ever before.

Centralized Project Documentation – Encourage collaboration and knowledge sharing through integration with Microsoft SharePoint™ Team Services, which provides a central location for organizing and tracking project-related documents and issues down to the task level.



3. Earn...

Earn Accurately

Customizable and automated revenue recognition, accounts receivable and billing tools will help you increase your cash flow and profitability.

Project Financial Reporting – Whether you are a project manager, line manager or project accountant, get easy access to the data you need for analyzing project financial performance – even on multiple projects at one time. Get a clear and detailed view of project and task profitability. Evaluate budgets versus actuals with fine grain accuracy using drill down and graphing tools.

Shorten Billing Cycles – Improve cash flow by automating your management of unbilled receivables. Utilize specific billing methods and apply custom mark up rules to automatically post billings to Accounts Receivable, and then to the General Ledger once they are approved.

Flexible Invoicing – Invoice customers with different types of projects and fees – all at one time. Choose from Time & Materials, Progress and Fee Billing methods. And, whether your company applies retainer, retention, project management or service fees to projects; you can schedule, track and invoice the appropriate amounts when you need them to be invoiced using custom invoice formats that meet the specific needs of your customers.

Recognize Revenue Accurately – Manage using flexible revenue recognition methods that meet your specific business and project needs. Use cost plus, fixed price and time and materials methods at the project or phase level for more fine grained control over your revenue.

Contract Management – Turn change orders into billable work, automate the document tracking process and tighten payment controls to keep projects on budget.



"We are confident that implementing Microsoft Business Solutions PSA will contribute greatly to our bottom line. We are excited about the solution's ability to reduce billing errors, increase cash flow, increase employee utilization and ultimately, increase profits. We have more than 300 consultants working for Pcuped globally, and our vision is rapid deployment of easy to use, scalable solutions that allow all team members to work together to ensure that every project is successful. Our executives, project managers, consultants and accounting staff will now have tools that allow each group to stay informed of the other's activities. Microsoft Business Solutions PSA will contribute to a more seamless work environment and will allow us to focus on delivering higher quality services to our customers."

– Adrian Balfour, CEO, Pcuped



4. Grow...

Grows with You

Based on Microsoft technologies this solution will adapt quickly as you grow and can be tailored to meet the specific needs and goals of your project driven organization.

Easily Add New Functionality – The solution is integrated with other Solomon modules including: General Ledger, Accounts Payable, Accounts Receivable, Payroll, Distribution and Field Service. This ensures that project driven organizations with varying or changing needs – professional service firms to construction companies – can maximize their long-term investment.

Configurable and Customizable – Administrative tools allow non-technical users to make changes to best suit your organization's needs. Power users and programmers can customize the solution to provide unique enhancements and integrations to other line of business applications.

Reliability and Viability – With more than 20 years of experience meeting the needs of project driven organizations, Microsoft will continue to provide reliable and affordable solutions for years to come.

Project Driven Resellers – All Microsoft Business Solutions applications are delivered by a vast worldwide network of partner organizations that share a commitment to lasting customer relationships. These reseller partners, project driven organizations themselves, are among the most highly trained in the industry and can meet your needs as your business grows.

Total Ownership Experience – Microsoft Business Solutions provides award winning customer support that is among the best in the industry. Our "CustomerSource" Web site provides up-to-date product information for all current customers. Each year in the spring, our customer conference, Convergence, brings together thousands of customers to learn how to get the most from their business solutions.